



PRONTO xi

760.2

Marketing Advisory

KPI Library enhancements

Assign and track more detailed KPIs via a range of new and reworked KPIs to reach company goals.

Customisable KPIs are also available via the GL Executive Analysis Summary tool.



Versions: 760+

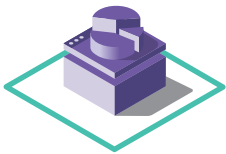
ID	Description	Metrics	760	Family	Type
2	Sales - Master Data - Sales	16	New	Sales	Global
87	AR - Ageing by Dimension - Invoice Date	8	New	Finance	
88	AR - Ageing by Dimension - Due Date	8	New	Finance	
89	AR - Master Data - Ageing by Dimension - Invoice Date	8	New	Finance	Global
90	AR - Master Data - Ageing by Dimension - Due Date	8	New	Finance	Global
91	AR - Transaction Analysis	12	New	Finance	
126	AP - Ageing by Dimension - Invoice Date	8	New	Finance	
127	AP - Ageing by Dimension - Pay By Date	8	New	Finance	
128	AP - Master Data - Ageing by Dimension - Invoice Date	8	New	Finance	Global
129	AP - Master Data - Ageing by Dimension - Pay By Date	8	New	Finance	Global
130	AP - Transaction Analysis	12	New	Finance	
190	Central CRM - Leads Pipeline	12	New	CRM	Global
191	Central CRM - Opportunities Pipeline	12	New	CRM	Global
195	Central CRM - Sales	33	New	CRM	Global
341	Sales Order - Delivered In Full On Time (DIFOT,DIF & DIFOTA)	54	New	Distribution	
421	Purchasing - Purchase History	12	New	Distribution	
422	Purchasing - Master Data - Purchase History	12	New	Distribution	Global

New KPIs by area

ID	Description	Metrics	Metric Change	Family
80	AR - Balance and Ageing - Invoice Date	52	36	Finance
81	AR - Balance and Ageing - Due Date	52	36	Finance
120	AP - Balance and Ageing - Invoice Date	52	36	Finance
121	AP - Balance and Ageing - Pay By Date	52	36	Finance
122	AP - Supplier Statistics	11	2	Finance
181	CRM - Leads Pipeline	12	6	CRM
182	CRM - Opportunities Pipeline	12	6	CRM
260	Project - Percent Complete	18	12	FM

Updated KPIs by area

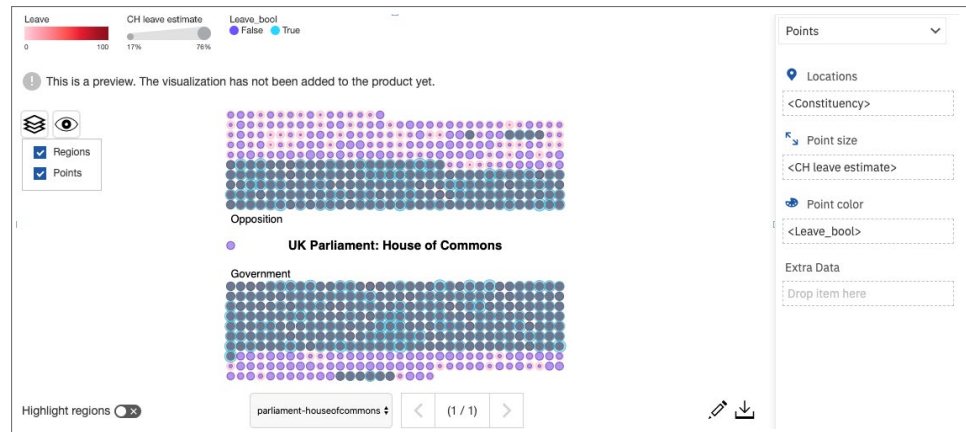
Improved visualisations in dashboards



With Cognos 11.1.7, you can get a quick start on new dashboards by saving existing ones as templates and save time by exporting visualisations data into a CSV for detailed analysis.

Organise arbitrary data better with schematics to visualise information like floor plans, seating arrangements, mechanical drawings and more.

Conditionally format crosstabs or tables and use the improved labels and legends for improved visibility.



A schematic chart to visualise arbitrary data

Exploration functionality

Read charts better with improved labels, legends and data-enabled smart titles.

Build explorations quickly by identifying fields using a search function.

Versions: 760+

Easy segmentation by date and time

Slice and dice data by date and time for sales across different timezones.

Enable a more precise comparison to understand the busiest time of the day or location for sales.



Versions: 760+

CRM synchronisation - NTLM authentication for Microsoft Exchange

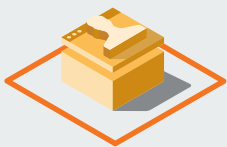
Available from Pronto Xi 730 and later versions.

This allows users to increase ways to synchronise email, tasks, calendars and contacts enabling greater sales team productivity.

Pronto Xi CRM synchronisation now supports the following methods for Microsoft products

- NTLM authentication for Microsoft Exchange Servers (inc. on-premise).
- OAuth for Office 365 users

Versions: 730+



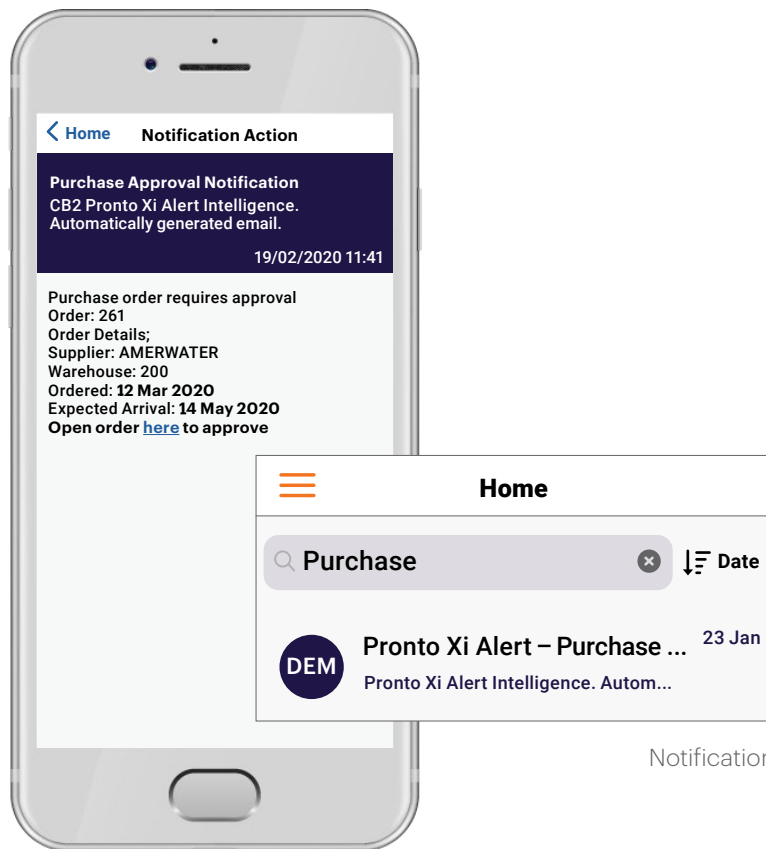
Notifier App

Know when key events occur within the system, using Alert Intelligence triggers in Pronto Xi.

Now available on Apple App Store and Google Play Store.



Versions: 760+



Notification

Get notified via Alert Intelligence

Pronto Xi Resource Scheduler

Pronto Xi Resource Scheduler is an extension of the foundation module Pronto Xi Resource Management.

An intuitive web application to enable quick allocation and rescheduling of resources, teams and equipment in response to ever-changing daily operation needs for maximum efficiency.



Versions: 760.2+

The screenshot displays the Pronto Xi Resource Scheduler interface. It is divided into two main sections: 'Unallocated Events' and 'Allocated Events', both showing a calendar view for Tuesday, 02/11.

Unallocated Events:

CUSTOMER	PRIORITY	DESCRIPTION1	TYPE	OWNER
Qwerty	Priority 3	BROKEN UNIT	Contract	Melbourne Service Centre
Qwerty	Priority 3	REP-Repair	Cash/Casual	Melbourne Service Centre
Qwerty	Priority 3	ALARMIND-Alarm Indicator	Contract	Melbourne Service Centre
Qwerty	Priority 3	REP-Repair of air con unit	Contract	Melbourne Service Centre
Qwerty	Priority 3	Heating unit not turning on	Contract	Melbourne Service Centre
Qwerty	Priority 3	REB-Rebuild cooling tower	Contract	Melbourne Service Centre

Allocated Events:

NAME	CODE	GROUP	ENGL	PRO..	LOCATION	CALENDAR
Ben Riggs	CV	Engineer		CV	Colombo	New Installation & System Configuration, Overdue - Fault investigation, Maintenance Review
Wendy O'Brien	LOB	Engineer		LOB	Melbourne	Fire Ext. Inspect, Full Pull-down and service of air-con filtration system, Audit Report
Gary Keys	GC	Plumber		GC	Melbourne	Audit Report, Tag & Test, Generator Repairs, Heat Sensor Calibration
Ray Bethmage	PBE	External Con		PBE	Colombo	
Fluke 805 Vibration Meter	VMD00	Equipment		VMD00		On-Site Equipment Storage - ACME project
Margie Coops	RC	Engineer	RC1	RC		

Schedule resources visually



Pronto Xi Customer Central

A portal that allows users to view orders, invoices, and statements online for added convenience.

Extend this portal to provide important notices as well as raise a request with the company's finance and administration teams which can be tracked and managed within Pronto Xi.

Versions: 760+

The dashboard shows a welcome message for Rob, a navigation menu, and several key sections: Orders, Invoices Awaiting Payment, and Activity. It also features a summary of financial metrics on the right side.

ORDER #	ORDER DATE	INVOICE #	STATUS	TOTAL (w/ST)
1049	16/03/2020	---	Entered	\$11,250.00
1061	01/22/2020	3431	Ready for Picking	\$9,500.00
1421	13/09/2020	3431	Back Order	\$10,300.00
1317	04/03/2020	3437	Updated	\$6,000.00
1235	16/03/2020	3437	Updated	\$14,250.00

INVOICE #	DATE ISSUED	DUE DATE	STATUS	INVOICE AMOUNT	REMAINING BALANCE	EARLY PAY DISC	NET BALANCE
32567	03/04/2019	02/06/2019	Overdue for 90+ days	\$21,300.00	\$11,000.00	\$ 0.00	\$11,000.00
32677	02/01/2019	01/03/2020	Overdue for 30+ days	\$14,250.00	\$14,250.00	\$ 0.00	\$14,250.00
33292	02/02/2019	01/02/2020	Overdue	\$18,500.00	\$18,500.00	\$ 0.00	\$18,500.00
3437	04/03/2020	03/03/2020	Generated	\$20,350.00	\$20,350.00	\$ 2,005.00	\$18,350.00
3431	01/03/2020	03/04/2020	Generated	\$18,800.00	\$18,800.00	\$1,980.00	\$17,820.00

Pronto Xi Customer Central Dashboard

The invoice list shows a table of invoices with filters and a summary of selected items. It also includes a B2PAY logo and a 'PAY NOW' button.

INVOICE #	DATE ISSUED	DUE DATE	STATUS	INVOICE AMOUNT	REMAINING BALANCE	EARLY PAY DISC	NET BALANCE	
<input type="checkbox"/>	32567	03/04/2019	02/06/2019	Overdue for 90+ days	\$21,300.00	\$11,000.00	\$ 0.00	\$11,000.00
<input checked="" type="checkbox"/>	32677	02/01/2019	01/03/2020	Overdue for 30+ days	\$14,250.00	\$14,250.00	\$ 0.00	\$14,250.00
<input type="checkbox"/>	33292	02/02/2019	01/02/2020	Overdue	\$18,500.00	\$18,500.00	\$ 0.00	\$18,500.00
<input type="checkbox"/>	3437	04/03/2020	03/03/2020	Generated	\$20,350.00	\$20,350.00	\$ 2,005.00	\$18,350.00
<input type="checkbox"/>	3431	01/03/2020	03/04/2020	Generated	\$18,800.00	\$18,800.00	\$1,980.00	\$17,820.00

2 Invoices Selected \$25,250.00 TOTAL PAY NOW

Invoice List



About Pronto Software

We are an Australian developer of award winning business management and analytics solutions.

Pronto Xi, our Enterprise Resource Planning (ERP) software, integrates accounting, operational and mobile features in a single system – optimising business processes and unlocking actionable insights. That's why for more than 40 years, over 1,700 Australian and global organisations, across a wide range of industries, have trusted Pronto Xi to simplify their most complex challenges.

With headquarters and our Development Centre located in Melbourne, we have support offices and consultants based across Australia, as well as a global network of Resellers and Solution Partners. Specialised business units within Pronto Software have the expertise to assist you with pivotal technology – Digital Commerce with Pronto Woven, Cloud and Hosting services with Pronto Cloud and Business Intelligence solutions with Pronto iQ.

info@pronto.net
1300 PRONTO (1300 77 66 86)

 pronto.net
 @ProntoSoftware

 Pronto-Software
 ProntoSoftware

This document contains statements related to our current and future developments that may constitute forward-looking statements. They are subject to changes and may be available in a Pronto Xi 760 service pack or future release of Pronto Xi.

Pronto Software, Pronto, Pronto Xi, the Pronto interrobang logo, the P interrobang logo, Pronto Woven, Pronto iQ and Pronto Cloud are all registered trademarks of Pronto Software Limited.

All other marks are the property of their respective owners. Copyright © 2020 Pronto Software Limited (ABN 47001337248)